

Before You Begin LOA

PA30 or PA20

- IT0000 – Actions
 - View employee's last Action; verify eligible for requested leave
- IT0007 – Planned Working Time
 - see if employee is negative or positive employee. **NOTE:** If negative, use Copy function, change the date to the date of the Action, and change the "Time Management Status" field to a "1". When the employee is re-instated, be sure to go back to IT0007 and change the type back to negative.
- If employee is using leave for LOA, PT50 to ensure that employee has enough in leave balance.
- CATS_DA to see if time has been entered, released and approved.
- Check to see if any Agency-specific benefits (handled outside of SAP)

Slide 1

Before processing any type of Leave of Absence (LOA) use the above checklist.

Keep in mind that any Agency-specific benefits are not part of SAP. The Agency will have to work with the employee regarding whether the Agency specific benefits are stopped or if continued how payment will be received.

Leave of Absence - General

1. Create Workflow for LOA and applicable Reason
2. Receive Approval in Inbox and process infotypes:
 - a) Actions – Save (everything defaults from WF)
 - b) Organizational assignment (enter Contract field if applicable for STD)
 - c) Monitoring of tasks:
 - i. Reminder to follow-up estimated return date
 - d) Objects on loan (delimit or by-pass)
 - e) Substitutions – all employees on LOA are to be put on substituted work schedule:
 - i. Date: from Action date until 12/31/9999
 - ii. Subst. Type field: Appropriate reason
 - iii. Work Schedule Rule: D01N08GN for FT; use a 3 in ES grouping for PT

Slide 2

This presentation focuses primarily on Short Term Disability and Military Leave. However, much of the information presented is applicable for any type of Leave of Absence (LOA).

Monitoring of Tasks: if using leave, then do one reminder in Action (either the leave run out or estimated return date) and do the other using PA30.

If not using leave, then you only need to do the 0019 in the Action for estimated return date.

Substitutions: All LOA employees are to be put on substituted work schedules so that any leave that is taken will be applied appropriately. For example, if DOT employee that is 24 hours goes on leave, and not put on substitution, then when the 2001 for leave is applied (for example 5 days leave) SAP thinks the person should be deducted 24 hrs for 5 days. Even if the employee is already on positive pay, he or she must be put on a Substitution. A negative time employee must be changed (IT0007) to positive in addition to Substitution; otherwise the employee will receive his or her regular salary. You should always check infotype 0007 Planned Working time and ensure that the Time Management Status field is "1" for positive working time and change when applicable.

Leave of Absence – General (2)

f) Pop-up for Absences subtypes

Is EE using Leave?

No

Yes

g) If applicable, use 2001 to enter 9400; otherwise close pop-up.

h) Select appropriate type (if ee is using more than one type, you will do a PA30 after the Action to add the other ones):

a) Dates: From Action date to xxxxx (whatever date it takes to use the leave the ee has requested)

i) Pop-up for time quota compensation (payout)

Has EE chosen payout?

No – Close popup

Yes

Slide 3

When an employee is on leave, either HR or Time Administrator should be entering the leave if applicable on 2001 and the 9400, not the employee.

Pay out: Employee either has to exhaust leave or receive payout—can't do both at the same time.

Last Day Worked Not for LOA

System Help

Employee Action Request

PCR Number: 1000005276
 Personnel Number: 80000560 Dianne Burger11
 Last 4 digits(SSN):
 Effective on: 09/01/2008 Chng: 08/11/08 ZMF INOMP A191 St: M Completed
 Action: Z2 Re-Instatement (NC)
 Reason: 07 Rtn from Short Term Dis Comple

CURRENT		PROPOSED	
Pers Area	4601 Cultural Resources	Pers Area	4601 Cultural Resources
Subarea	NC01 7day Norm	Subarea	NC01 7day Norm
EE Group	A SPA Employees	EE Group	A SPA Employees
EE Subgroup	A1 FT N-FLSAOT Perm	EE Subgrp	A1 FT N-FLSAOT Perm
Org Unit	20010337 CR CDS A&H MOH Museum of	Org Unit	20010337 CR CDS A&H MOH Museum of
Job	30011668 Regional History Museum A	Job	30011668 Regional History Museum A
EE Position	65001724 Administrator Museum Of The C	EE Position	65001724 Administrator Museum Of The C

☐ Work Against

Basic Pay

CURRENT		PROPOSED	
Pay Scale type	04 T-Grade	Pay Scale type	04 T-Grade
Pay Scale Area	01 Annual Salaries	Pay Scale Area	01 Annual Salaries
Pay Scale Group	T674 Level T6	Pay Scale Group	T674 Level T6
Annual Salary	43,550.00	Annual Salary	43,550.00
Hrly Sal	0.00	Hrly Sal	0.00
Calc Step	0	Calc Step	0
Min	44,670.00	Min	44,670.00
Max	73,833.00	Max	73,833.00
Next Inc Date		Next Inc Date	

Dates

Last day worked

Do not use for LOA (only for Separation Pay Continuation and Separation)

Slit

LOA and Negative Employee

Infotype Edit Goto Extras System Help

Copy Planned Working Time (0007)

Work schedule

Personnel No. 80000561 Name Dianne Bur

EEGroup A SPA Employees PersA 4601 Cultur

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 08/11/2008 To 12/31/9999

Work schedule rule

Time Mgmt status 9 - Negative Time Recording

Working week 0 - No time evaluation

☐ Part-time employee

Working time

Employment percent 8.00

Daily working hours 8.00

Weekly working hours 40.00

Monthly working hrs 173.33

Annual working hours 2080.00

Weekly workdays

• If negative—change to positive:

1. PA30
2. IT0007
3. Use **Copy** function
4. Enter the effective start date (leave "to" date to 12/31/9999)
5. In the Time Mgmt status field, select "1" – Positive Time Recording
6. Save
7. PA30 – 0019-Monitoring of task reminder to change back to negative when reinstated from LOA

Slide 5

You only change IT0007 if the employee going on LOA is a negative time employee. If the employee is already positive, you do not perform this step..

IT0001 – Contract Field and STD

Copy Organizational Assignment (0001)

Personnel No 00000561 Name Dianne Burger12

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 01/01/2008 to 12/31/9999

Enterprise structure

CoCode NC01 STATE OF NC

Pers. area 4601 Cultural Resources Subarea NC01 7day Norm

Cost Ctr 469999999 CULTURE RESOUR Bus. Area 4600 Cultural Resources

Fund 469999999 CULTURE- SUSPEI

Func. Area 6000000000000001

Personnel structure

EE group A SPA Employees Payr. area NC Monthly

EE subgroup A1 FT N-FLSAOT Perm Contract

Organizational plan

Percentage 100.00

Position 65001725 800904000790

Job key 30011668 Reg His Msm

Org. Unit 20010337 48080402835

Org. key 460146999999999

Contract field may applicable for STD LOA in certain circumstances

SHP-STD<5 Rtmnt

For most LOA Actions, you merely save IT0001 – Organizational Assignment. However if the LOA is for Short-Term Disability (STD) you use the contract field as follows:


Leave blank if either

- Employee has 5 or more years creditable service
- Employee is using leave *
- Employee is on FMLA

Select SHP-STD < 5 Rtmnt if employee has fewer than 5 years creditable service and not using leave

* If employee's leave runs out before returning, you must create new Action (LOA, Reason STD Regular), and select Contract field if applicable.

Create Substitutions Infotype



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- All employees on LOA must be on a substituted work schedule

Infotype Edit Goto Extras System Help

Create Substitutions (2003)

Personal work schedule Active External services

Personnel No	80000286	Name	Janet Thomas01
EE group	A SPA Employees	Personnel ar	4601 Cultural Resources
WVS rule	D01N08GN MTWHF-8,SaS-O	Status	Active
From	08/12/2008	To	08/12/2008

Subst. type 08 STD (1st 6 mths after 89)

Work schedule rule	D01N08GN MTWHF-8,SaS-O	ES grouping	3
Holiday Calendar ID	NC	PS grouping	10

If FT, enter D01N08GN; press enter. The remaining fields populate

If PT, enter 3; press enter and then go back and select the WSR from drop down list

"to" date always 12/31/9999

08

3

10

Substitution Type (1) 11 Entries to

Restrictions

PS Grouping: 10

Type	Text
01	Employee Substitution
02	Shift substitution
05	LOA Generic
06	STD (1st 6 mths prior 89)
07	STD (2nd 6 mths prior 89)
08	STD (1st 6 mths after 89)
09	STD (2nd 6 mths after 89)
10	LOA - FMLA
11	LOA - WVC Regular
12	LOA - WVC Salary Cont
13	LOA - Military

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Date: The substitution is directly related to the Action, therefore, the **From** date should be the date of the Action, and the **To** date should be 12/31/9999.

Substitutions type: For Short-Term Disability, the applicable subtypes are :

- 05 - LOA Generic: Use when none of the other subtypes apply.
- 06 – STD: Employee has five or more years of service as of 8/12/1989 for the first six months of STD (benefits not subject to state tax). **Important:** Verify there has been no break in service. The 1st 6 mos. Includes the 60 day waiting period.
- 07 – STD: Employee has five or more years of service as of 8/12/1989 for second six months of STD (benefits not subject to state tax).
- 08 – STD: Employee did **not** have five or more years of service as of 8/12/1989 for first six months of STD (benefits subject to state tax). Includes 60 day waiting period.
- 09 – STD: Employee did **not** have five or more years of service as of 8/12/1989 for second six months of STD (benefits subject to state tax).

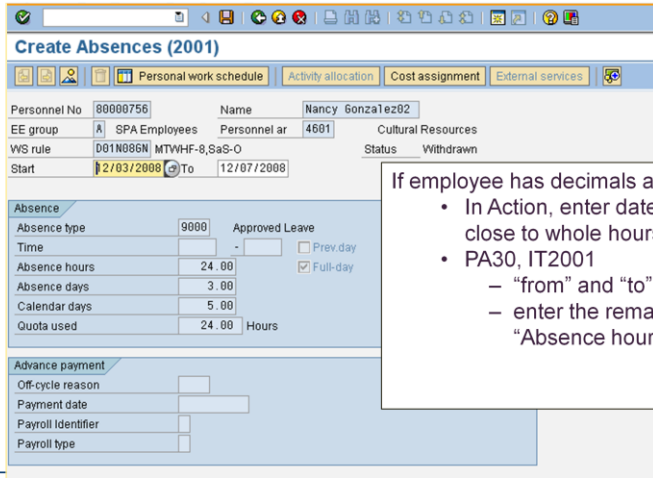
For STD, Substitutions is an infotype that you will have to track and change as applicable (IT0019) in order to ensure that the employee's STD benefits are taxed appropriately.

Daily work schedule: Leave blank.

Work Schedule Rule: If the employee is full-time (40 hours a week), enter D01N08GN in the work schedule field (you must do this even if the employee is already D01N08GN). When you press Enter, the other fields will default with the appropriate information. If the employee is part-time (less than 40 hrs/week), enter a '3' in the ES grouping field. Use the Work schedule rule field matchcode to select the appropriate part-time schedule.

Absences IT2001

- Infotype only appears if a leave type was selected on “subtype for Absences” popup
- Can only enter one IT2001 in Action; if more than one leave type is needed, others are entered in PA30



- If employee has decimals and wants to use
- In Action, enter dates on 2001 to get as close to whole hours as possible
 - PA30, IT2001
 - “from” and “to” dates the same date
 - enter the remaining hours in the “Absence hours” field

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The Absences infotype (2001) indicates the number of hours the employee wants to use for leave and deducts from the leave quotas as applicable. The dates you enter on the Absences infotype should align with the number of hours the employee wants to be paid out for leave. For instance, if the employee wanted to use 24 hours of leave for the week of 12/3/08 through 12/7/08, you would enter those dates in the **Start** and **To** fields. The “to” date should never be 12/31/9999.


The hours that default are based on the work schedule rule entered on the Substitution infotype combined with the dates you enter on the Absences infotype.

If the employee elects to use more than one leave type, you can only enter one type in the Action. To enter the other leave types, you enter must access PA30 and enter a new IT2001 for each additional leave type.

Because BEACON is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered. If the Create Absences infotype is not completed, the employee is on leave without pay. If longevity or leave accruals need to be stopped, you should enter 9400 on 2001.

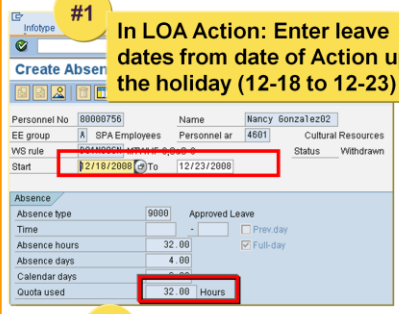
As long as the employee is receiving pay (leave or STD benefit), benefits will continue to be deducted. If not receiving pay, employee must pay for benefits or discontinue them.

To use decimals: Example: Employee has 546.98 hours and wants to use all of them. In LOA Action on IT2001, enter dates so that system calculates as close to whole hours as possible (for example 544). Then process a PA30, IT2001. Enter the effective date with the same from and to date (for example 12/15/08 to 12/15/08). Enter the remaining hours (in the Absence hours column (2.98 in the example).

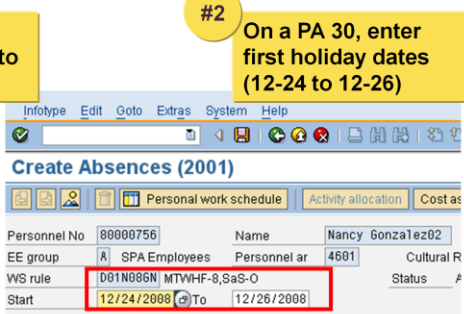


Absences (2001) Example with Holidays

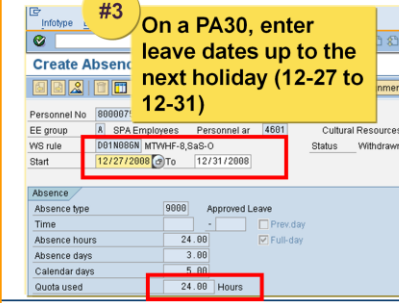
#1 In LOA Action: Enter leave dates from date of Action up to the holiday (12-18 to 12-23)



#2 On a PA 30, enter first holiday dates (12-24 to 12-26)



#3 On a PA30, enter leave dates up to the next holiday (12-27 to 12-31)



continued

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If the employee is using leave during a time that includes a holiday, additional 2001 infotypes will be necessary to allow the employee to take holiday leave. The additional 2001 records are created in transaction PA30. For example, assume an employee is going out on military leave on December 18 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there are two holiday periods (12/24 – 12/26/2008 and 1/1/2009). Your entries would be as follows:


1. During the LOA Action, on the Absences (2001) infotype, you will enter the dates for the leave to be exhausted up to the holiday period in the Start and To fields:

Start: 12/18/2008 To: 12/23/2008 (32 hours leave)

By entering the dates above the system calculates that four working days fall within the date range. The substitution previously created issues an 8 hour workday for the employee; therefore, 32 hours default into the Absence hours field.

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

Start: 12/24/2008 To: 12/26/2008 (24 hours holiday)



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Absences (2001) with Holidays (cont.)

#4 On a PA30, enter the holiday leave dates (1/1 to 1/1)

#5 On a PA30, enter the remaining leave dates (1/2 to 1/28)

Infotype Edit Goto Extras System

Create Absences (2001)

Personal work schedule Activity allocation Cost assignment

Personnel No 80000756 Name Nancy Gonzalez02
 EE group A SPA Employees Personnel ar 4601 Cultural Re: L
 WS rule 001N086N MTWTF-8,SaS-O Status Act
 Start 01/01/2009 To 01/01/2009

Absence

Absence type 9300 Holiday Leave
 Time - ☐ Prev day
 Absence hours 8.00 ☒ Full-day
 Absence days 1.00
 Calendar days 1.00
 Quota used 8.00 Hours

Create Abs

Personnel No 80000756 Name Nancy Gonzalez
 EE group A SPA Employees Personnel ar 4601
 WS rule 001N086N MTWTF-8,SaS-O
 Start 01/02/2009 To 01/20/2009

Absence

Absence type 9000 Approved Leave
 Time - ☐ Prev day
 Absence hours 104.00 ☒ Full-day
 Absence days 13.00
 Calendar days 13.00
 Quota used 104.00 Hours

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3. Create a PA30 to enter the next leave period **up to** the next holiday, infotype 2001, subtype 9000:
 Start: 12/27/2008 To: 12/31/2008 (24 hours **leave**)
4. Create a PA30 to enter the next holiday period, infotype 2001, subtype 9300:
 Start: 01/01/2009 To: 01/01/2009 (eight hours **holiday**)
5. Create a PA30 to enter the remaining leave, in this case 104 hours, infotype 2001, subtype 9000
 Start: 01/02/2009 To: 01/20/2009 (104 hours **leave**)

By entering the data on the Absences infotype as explained in this manner it is not necessary for a separate time sheet to be entered for the employee. If data is not entered on this infotype, the employee is on leave without pay.

Using Leave Accrued While Out

An employee who is out on paid leave is accruing additional leave. If an employee wants to use the leave that was accrued while out, you would create a PA30 for IT2001 after the accrual to use the number of hours that have been earned while out.

Absences IT2001

• Using 9400

Infotype Edit Goto Extras System Help

Create Absences (2001)

Personal work schedule Activity allocation Cost assignment External services

Personnel No. 88888756 Name Nancy Gonzalez02

EE group
WS rule
Start

Absence
Absence type
Time
Absence hours
Absence days
Calendar days
Quota used
Advance payment
Off-cycle reason
Payment date
Payroll identifier
Payroll type

Use 9400 when the employee is not to accrue while on unpaid leave:

- Longevity
- Leave

Some types of leave allow employees to continue to accrue (see State policy). In those cases, do not enter 9400. For example, do not use 9400 for Military Leave.

When applicable:

- longevity automatically calculates upon Reinstatement
- Leave accruals are not automatic and must be manually entered via PA30, IT2013

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Some types of unpaid leave of absence (like Military) allow the employee to continue to accrue longevity and leave (review State policy). In those cases, do not enter 9400 for the employee. If the employee on LOA is not supposed to accrue leave, then 9400 should be entered for the days the employee is out on unpaid leave.

If the employee is on LOA, the employee cannot enter hours in ESS. An employee on LOA cannot have hours coded to 9500.

Using 9400 and 9500 on the same day for employee not on LOA

If the employee is **not on LOA** but is not at work for part of the day, codes 9400 and 9500 can be entered on the same day. However, keep in mind that the total of the two codes cannot exceed the work schedule hours. If the work schedule hours are exceeded, the hours coded to 9400 will take precedence. For example, if 9400 is entered for 4 hours, and 9500 for 6 hours, then the hours for 9400 will prevail and wipe out all of the hours coded to 9500 (not just the two hours that were over 8, but the entire entry for 9500).

Absences – Using Voluntary Shared Leave

Infotype Edit Goto Extras System Help

Create Absences (2001)

Personal work schedule Activity allocation Cost assignment External services

Personnel ID: 00000756 Name: Nancy, Sandra

EE group: Absence: 0613

WIS rule: Absence

Start: Absence

Time: Absence

Calendar: Absence

Quota: Absence

Advance payment

Off-cycle reason

Payment date

Payroll Identifier

Payroll type

- In order for a leave donation to be correctly processed, the receiving employee must have a current Absence Pool record (Infotype 696).
- The Donor infotype 0613 must be created; hours are available to recipient next day
- Donated leave goes into the sick bucket of recipient
- Recipient can use the donated leave only after all of the recipient's vacation, sick and bonus is gone

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Benefits Overview

- Benefits

- Employee receives LOA Continuation notice (transaction ZBNS008)
- Employee returns to BEST indicating "continue" or "do not continue"
- BEST changes benefits as applicable
- Vendors are notified electronically if benefits are stopped

STD employees who continue benefits and receive any type of pay:

- both health insurance and NCFlex premiums deducted from STD payments on an after-tax basis.
- BEACON automatically delimits 401(k), 457 and 403b *

STD employees who continue benefits and not receiving any type of pay:

- Must mail health insurance premiums to BEST Shared Services Payroll by last day of each month
- Must send monthly check directly to NCFlex vendor

*LOAs other than STD, BEACON does not automatically delimit the 401(k), 457, and 403. Employee needs to call vendor to stop.

LOA for Workers Comp w Supplement – deductions will be made from supplement, but not from WC payment.

Employees who are out on leave of absence will receive an LOA Continuation form letter. **NOTE:** The letters only print if IT0019 was created for "estimated return date". The form letter is generated by either HR or Benefits using transaction code ZBNS008.

On the form, the employee indicates if benefits should be continued or stopped and returns the form to BEST. If the benefits are to be continued, as long as the employee is receiving pay (leave or STD payments), the deductions for benefits will automatically occur on an after-tax basis. If the employee is not receiving either STD payments or leave, then the employee must send a check as applicable by the benefit deadline date. NC Flex must be sent directly to the vendor according to the vendor's deadline. Insurance premiums are sent to BEST by the last day of each month.

If the employee has Agency specific deductions, those are handled outside of SAP. The Agency should notify the employee about the process in those cases.

LOA Action via ZPAA076 Workflow

Action	Reason and Definition	Employment Status
LOA – used when an employee is out of work on paid or unpaid leave.	<ul style="list-style-type: none"> Short-Term Disability 60 day waiting period – to track waiting period regardless if paid or unpaid. Short-Term Disability (Leave) – employee is using leave during short-term disability. Short-Term Disability (lump sum) – employee is paid out for leave in one payment. Short-Term Disability Regular – employee is placed on this reason on the 61st day if not using leave. Short-Term Disability Extended – employee is extended beyond 12 months. 	Active

Either or—not both:


(Leave) or (Lump Sum)

Infotypes:

- 0000 – Actions
- 0001 – Org Assignment
- 0019 - Monitoring of Tasks
- 0040 – Objects on Loan
- 2003 – Substitutions
- 2001 – Absences (only if a leave type was selected in pop-up)
- 0416 – Time Quota Compensation (only if a payout type was selected in pop-up)

Slide 14

Create Employee Remuneration (IT2010)



Infotype Edit Goto Extras System Help

Create Employee Remuneration Info (2010)

Personal work schedule Activity allocation Cost assignment External services

Wage Types for Infotype "Employee Remuneration Info" (2) 20 Entries found

Personnel No 80000306 Name
 EE group SPA Employees Personnel
 WS rule 001N086N MTWHF-8,SaS-O
 Date 08/12/2008

Enter Wage type →

Enter Amount →

Remuneration info

Wage type 1334 STD 2nd 6 months w/ st bx

Number of hours
 Number/unit
 Amount 1,100.00
 Currency USD
 Extra pay/valuation
 Pay scale group/level
 Position/work center
 Overtime comp. type Depend
 Premium
 Premium Indicator
 Tax area record type
 External document number

• Separate IT2010s for each month
 • Can enter several months on same day with different effective dates
 • Limit of \$3k per current pay period

Slide 15

The second screen of IT2010 is used to enter the wage type and the dollar amount of the STD payment. The following wage types are used as applicable.

1332 – Select if employee did not have five or more years of service as of 8/12/1989 for the *first* six months of Short -Term Disability (STD). Benefits are subject to state income tax.

1333 - Select if employee had five or more years of service as of 8/12/1989 for first six months of STD. Benefits are not subject to state income tax.


1334 - Select if employee's did not have five or more years of service as of 8/12/1989 for *second* six months of STD. Benefits are subject to state income tax.

1335 – Select if employee had five or more years of service as of 8/12/1989 for second six months of STD. Benefits are not subject to state income tax.

Amount – Enter amount to reflect the calculated benefit amount to be paid from forms 714 and 711. For wage types **1332-1335**, BEACON SAP will only allow dollar amounts. Do not enter anything in the number of hours field or number unit field. You can enter multiple 703s on the same day (with effective dates applicable for the month being paid) as long as you do not exceed \$3k for the current pay period.

It is a best practice that IT2010 is not entered for a future date. If prior to Legislative Increase, you had already future dated IT2010, you must remember to go back and add in the increase.

Reinstatement of LOA




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2. Click Delimit button

Infotype Edit Goto Extras System Help

Delimit Substitutions (2003)



Personnel No	80000320	Name	Patricia Calloway15
EE group	A SPA Employees	Personnel ar	4601 Cultural Resources
WS rule	D01N086N MTWHF-8,SaS-O	Status	Active
Choose	09/30/2008 To 12/31/9999	STy.	Delimit date 09/30/2008

Start Date	End Date	ST	From	To	P	Hours	Brk	Start	End	Paid	Unp	St
09/01/2008	12/31/9999	10				0.00				0.00	0.00	

1. Select the line item

When the employee is reinstated, infotype 2003-Delimit appears in the Action. Select the line item and click the Delimit button to delimit the Substitution work schedule. This ensures that the employee is automatically returned to his or her regular work schedule.

Reinstatement of Negative Employee

Infotype Edit Goto Extras System Help

Copy Planned Working Time (0007)

Work schedule

Personnel No 88000561 Name Dianne Burge

EEGroup A SPA Employees PersA 4601 Cultural

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 12/31/2008 To 12/31/9999

Work schedule rule

Time Mgmt status

Working week

☐ Part-time employee

Working time

Employment percent

Daily working hours 8.00

Weekly working hours 40.00

Monthly working hrs 173.33

Annual working hours 2080.00

Weekly workdays

01100000 MTWTF--S,8AS-U

- Positive Time Recording

- No time evaluation

- Positive Time Recording

- PDC time evaluation

- Time evaluation without payroll integration

- External services

- Negative Time Recording

- If negative—change back to negative:
- 1. PA30
- 2. IT0007
- 3. Use **Copy** function
- 4. Enter the effective start date (leave "to" date to 12/31/9999)
- 5. In the Time Mgmt status field, select "9" – Negative Time Recording
- 6. Save

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When you reinstate an employee who was a negative time employee, you must go back to IT0007 and change the employee back from negative to positive.

Military LOA Action and Reasons

Action	Reason and Definition	Employment Status
LOA – used when an employee is out of work on paid or unpaid leave.	<ul style="list-style-type: none"> • Reserve Active Duty (leave) – employee is exhausting vacation, bonus or comp time prior to RAD 30 day leave. • Reserve Active Duty (lump sum) - employee is paid for vacation, bonus or comp time prior to RAD 30 day leave. • Reserve Active Duty (30 days) – employee is placed on RAD 30 days with Active Duty orders (calendar days) • Reserve Active Duty – employee is placed on RAD Active Duty on 31st day. • Extended Military – Granted for all uniformed service duty that is not covered by military leave with pay as defined by policy for active 	Active

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Military LOA

Situation: Employee going on LOA Military and using leave prior to 30 days Active duty. According to State Personnel Manual, employee must use leave prior to Reserve Active Duty (30 days). **Three Actions are involved.**

Use the "before you begin an LOA" checklist

- 1st Action: LOA Workflow (ZPAA076)
 - Reason: Reserve Active Duty (Leave)
- 2nd Action: LOA Workflow (ZPAA076) effective 1 day after leave time has been used
 - Reason: Reserve Active Duty (30 days)
- 3rd Action: LOA Workflow (ZPAA076) effective 31st day after Reserve Active Duty (30 days) began (or 1st day that RAD (30) ended).
 - Reason: Reserve Active Duty

Military LOA

- 1st Action: LOA Workflow (ZPAA076)
 - Reason: Reserve Active Duty (Leave)
- After approval received, execute Personnel Action:
 - IT000 Actions – Save
 - IT0001 Org Assignment – Save
 - IT0019 Monitoring of Tasks – Enter reminder date for **estimated return date** based on orders
 - IT0040 Objects on Loan – Skip or Delimit Objects on Loan according to Agency policy
 - IT2003 Substitutions - Enter **effective date** and **12/31/9999**. Select “**Military**” and **Work Schedule rule** as applicable
 - Pop-up for Absences subtype: select **applicable leave type**
 - IT2001 Absences - **enter dates** that correspond to use requested leave hours
 - Pop-up for lump sum payout – close
- PA30, IT0007: If negative employee, use Copy function to change to Positive
- PA30, IT0019: A second reminder for estimated leave run out in 30 days; new Action needed

Slide 20

Military LOA

- 2nd Action: LOA Workflow (ZPAA076) effective 1 day after leave time has ended
 - Reason: Reserve Active Duty (30 days)
- After approval received, execute Personnel Action
 - IT000 Actions – Save
 - IT0001 Org Assignment – Save
 - IT0019 Monitoring of Tasks – Enter reminder date for **30 days that a new Action will be needed**
 - IT0040 Objects on Loan – Skip or Delimit Objects on Loan according to Agency policy
 - IT2003 Substitutions – Save. This should be pre-populated from the 1st Action
 - Pop-up for Absences subtype: select **Military Active Duty**
 - IT2001 Absences - enter **dates** that correspond to **30 calendar days**
 - Pop-up for lump sum payout – close
- **Differential pay:** If an employee is eligible for differential pay it is paid through Accounts Payable (not by BEST Shared Services Payroll). Therefore, you must coordinate with your Accounts Payable Office to ensure that you send them the appropriate paperwork so the employee is paid his or her differential while out on military leave.

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Military LOA

- 3rd Action: LOA Workflow (ZPAA076) effective 31st day after Reserve Active Duty (30 days) began (or 1st day that RAD (30) ended).
 - Reason: Reserve Active Duty
 - After approval received, execute Personnel Action
 - IT000 – Save
 - IT0001 – Save
 - IT0019 – Enter reminder date for estimated return date based on orders
 - IT0040 – Skip or Delimit Objects on Loan according to Agency policy
 - IT2003 – Save. This should be pre-populated from the 1st Action
 - Pop-up for Absences subtype: Close*
 - Pop-up for lump sum payout – close
- * Do not enter 9400 on 2001. The employee is still eligible for longevity and leave accrual.
- Longevity automatically occurs when employee is reinstated
 - Leave accrual must be manually entered when employee is reinstated (IT2013)

Examples

Situation

- Employee on LOA- FMLA for several weeks before you receive paper work that it is STD retro to the effective date of FMLA

Solution

- If the 60 day waiting period has not expired:
 - enter new LOA for 60 day waiting period (can be with or without leave). Monitoring of task reminder for date 60 day ends. Write note that STD retro to FMLA action which includes 60 day waiting period
 - 61st day enter new LOA for either STD (Leave) if employee is using leave, or STD Regular if not using leave
- If the 60 day waiting period has already expired:
 - Enter new LOA for either STD (Leave) if employee is using leave, or STD Regular if not using leave

Examples

Situation

- Employee on LOA- STD (Leave) for several weeks/months and leave runs out. However, in the meantime employee has leave that has been donated or has accrued. How is it used?

Solution

- Verify with Leave Administrator or run PT50 to ensure Leave is in the appropriate bucket (donated leave is available only after time eval has run and is put in the sick bucket)
- Create a new 2001 for the dates that correspond to use the donated leave or enter the leave that the employee has accrued.

Note: If employee runs totally out of leave before returning, create a new LOA, Reason: STD Regular. Use the Contract field on IT0001 if applicable.

Q & A

- EE on LOA using leave, how is it entered in system?
 - IT 2001 in the Action. You may also have to do a PA30 IT2001 if employee is using more than one leave type (can only enter one IT2001 in Action)
- Can employee on LOA enter time through ESS?
 - No. The employee cannot enter time when on LOA; 2001 should be entered by HR MD Mtnr or Time Admin, not employee
- How can I look at employee record and tell whether on LOA with pay or without?
 - IT2001 indicates employee is getting paid—use Overview function; if there are no IT2001s on record, employee is not getting paid. Also run Off Cycle Workbench Remuneration Statement.

Q & A

- If ee is on LOA with leave, can we use either 2001 or CAT2?
 - You should be using 2001
- If a 2001 already exists and someone enters leave for those same dates in CAT2, will the person be double deducted?
 - Yes
- Can you confirm that someone on LOA will not be paid unless someone has entered leave (either ESS or CAT2) or 2001
 - Only if put on Substitution (2003) and set time management on 007 to "1"—positive pay; otherwise if a negative pay employee, he or will get base salary
- If the employee is on LOA, how do you enter a 2001 where the employee gets paid for half the day and is taking leave without pay the other 4 hours?
 - Enter two PA30s for 2001—one for the leave type (approved, sick etc.) and one for the 9400

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Q & A

- Is there anything we should know about someone who does not reinstate but separates for some reason?
 - No. You would choose the applicable Separation Action: either Separation Pay Continuation or Separation
- We put employee out on LOA and the employee has no leave to use; however, someone gives shared leave, what do we do?
 - Enter a 2001
- If we used 2001 for xx amount of leave, and ee comes back early, what do we do?
 - Delimit the 2001

Q & A

- If I entered FMLA “continuous” and it should have been entered “intermittent” how do I correct the error?
 - You cannot change the Event if there are any absences associated with it. So first, you would have to disassociate the absences, correct the event (pencil) and then reapply the absences
- What absences show up on Workbench?
 - Any approved and transferred absences that occur during the Event timeframe
 - Absences with start date in valid period and end date outside of period appear, but cannot be selected
 - Absences completely outside the Event timeframe do not appear
 - Absences with end date of 12/31/9999 do not appear

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Keep in mind that Workbench is not tied to the Action; therefore you must work closely with your Time Administrator to ensure that the FMLA event is created and that absences are associated as applicable.

1) What is the affect of changing an event from *Continuous* to *Intermittent* (or vice versa)? Will the applied absences still be relevant after the change?

Once absences have been tied to an FMLA event, the period information can not be modified. That is, a change from continuous to intermittent or vice versa can not be made. In order to make such a change, the event can not have any absences tied to it. Thus, any attributed absences must be de-selected, the change made, then the absences re-applied.

2) What absences show up on the workbench for an FMLA event?

Any absences that have been approved and transferred (shown on IT2001) and fall completely or partially within the valid dates of the FMLA event will be shown on the absences tab in the work bench. This includes both single and multi-day absences. If an absence falls completely outside the valid date range on the event, it will not be displayed. It also appears that an absence with a valid date through high date (12/31/9999) does not display. An absence with a start date in the valid period and an end date outside the period will be displayed, but will not be available for selection.